

Acumatica 2021 R2 - What's New

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Release Info

- Over 90 New Features!
- 2 Releases per year
 - R1 around March/April
 - R2 around October

Finance

- Updates to Customer Refund processing *
- Matching of bank transactions *
- AP Document Recognition updates *
- Multiple base currencies
- Vendor search by email address on AP OCR *
- UI enhancements

Customer Refunds and Applications

- Old: manually create refund, enter details, apply to open payment, prepayment, cm
- New: find open payment, prepayment, cm record, select Refund as the action
- Also: can apply unreleased AR invoices to open payment records

Enhancements to Bank Trx Matching

- Match to Multiple Payments
 - Great if bank import has 1 deposit for many individual transactions in Acumatica
- Match to Receipts and Disbursements
 - Able to match to any available receipt or disbursement based on direction

AP Document Recognition Updates

- Faster time to recognize
- Enhanced Details mapping ability

Vendor Search by Email Address

The image displays two screenshots from a software application. The left screenshot shows an email interface with the 'From' field containing "Ryan Carter" <allfruitsmall@gmail.com>, where the email address is highlighted with a red box. The right screenshot shows a vendor profile for 'ALLFRUITS - All Fruits Mall'. The 'CONTACTS' tab is selected and highlighted with a red box. In the 'ACCOUNT INFO' section, the 'Account Email' field contains 'allfruitsmall@gmail.com', which is also highlighted with a red box. Other fields in the vendor profile include Vendor ID (ALLFRUITS), Vendor Status (Active), Vendor Class (DEFAULT - Default Vendor Class), Balance (1,139.10), and various address and contact details.

Figure: The sender's email address, which is used to search for a vendor

Figure: An email address specified for a vendor account

Multiple Base Currencies

- Each company now can have its own Base Currency, different from other Companies within the same tenant
 - Ex: USD company, CAD company, EUR company

CRM

- New Workflow for Sales Quotes *
- Enhanced relations between CRM entities *
- Enhanced support of UDFs
- Predefined business events and notification templates *
- Sendgrid email integration for emails
- UI enhancements

Order Management

- Customer refunds on Sales Orders and Invoices
- Drop Shipments for Projects
- Item substitution, cross-sell, up-sell
- Paperless picking – no more pick sheets
- UI Enhancements

Manufacturing

- Preassigned Serial and Lot numbers
- Visual Production Schedule
- Vendor Shipment Enhancements
- Firm scheduling of Production Orders

Preassigned Serial and Lot Numbers

- Pre-assign numbers on a Production Order
 - When materials being issued
 - When produced item is being moved to stock
- Allows to prepare labels and other paperwork before order is complete

Visual Production Schedule

Production Schedule Board

CUSTOMIZATION TOOLS ▾

SCHEDULE FIRM UNDO FIRM

PRODUCTION ORDER FILTERS

Warehouse:

Order Type:

Production Nbr:

Production Order Status:

Schedule status: **Both**

Product Workgroup:

Product Manager:

Include on Hold

REFERENCE FILTERS

Inventory ID:

SO Order Type:

SO Order Nbr:

Customer:

DATE RANGE

From: 8/29/2021 To: 9/7/2021

DISPLAY SETTINGS

Color Coding: Production Order Status

PRODUCTION ORDERS

Selected	Type	Production N	Inventory I	Dispatd	Constraint	F	2021 August 29						
							29 Aug	30 Aug	31 Aug	01 Sep	02 Sep	03 Sep	04 Sep
<input type="checkbox"/>	RO	AM000115	AMKEURIG	5	8/12/2020 12								
<input type="checkbox"/>	RO	AM000110	MGPCB	5	8/12/2020 12								
<input type="checkbox"/>	RO	AM000112	MGRESVIN	5	8/11/2020 12								
<input type="checkbox"/>	RO	AM000113	MGBASE	5	9/1/2021 12:0								

WORK CENTERS MACHINES

Work Center	Shift	Crew Size	Machines	2021 August 29								
				29 Aug	30 Aug	31 Aug	01 Sep	02 Sep	03 Sep	04 Sep		
WC10	0002	1	0									
WC100	0001	1	0									

Vendor Shipping Enhancements

- Create a new Purchase Order from a Production Order with expenses for outside processing services
- Create a new Vendor Shipment from a Production Order with outside processing operations

Field Service

- Quick creation of Service Document from Opp or Project
- Tracking profitability of Items in service orders
- New Service contract billing types
- Mobile app enhancements

Other Areas

Commerce

Payroll

Projects

System

- Workflow – assign categories to Actions
- Workflow – save changes before Action performed
- UI – redesigned form toolbar
- DAC Schema Browser
- CRM Task Subscriber on Business Events

Related Information

- <https://www.acumatica.com/acumatica-2021-r2-virtual-launch-event/>
- https://acumatica-builds.s3.amazonaws.com/builds/21.2/ReleaseNotes/AcumaticaERP_2021R2_ReleaseNotes.pdf

Questions?

- Please reach out to your account manager or me!